

Business Requirements for IAC Online Grant Application Working Document

Ability to copy last year's application so the applicant can update only the pertinent areas

Ability to accept attachments. Applicants are required to submit artistic documentation with their application. The applicant ought to be able to upload and attach this documentation to their application.

Ability to customize fields and insert necessary controls such as: forced fields, character limit restrictions, format restrictions.

Ability to save a partially completed application and return to it at a later date.

De-duplication feature. In the event that a record is accidentally duplicated a de-duping feature should be present so the two records can be merged.

Form creation. Once an applicant submits their application electronically, IAC needs to have the ability to select certain fields and generate a form that will be printed out in hard copy.

Require a project manager and single contact who oversees the transfer and conversion of the paper based form to the web based forms. Someone who understands the larger picture, the goals and objectives necessary for the project to be a success. This person will work closely with IAC staff to understand their process needs and help IAC to translate these needs into an electronic environment. This person may also be asked to assist in training both IAC staff and its Regional Partners.

Intuitive platform for IAC staff to interface with; query, search, update, add records, and generate professionally formatted reports.

Area for applicant to submit their interim report, final grant report.

Fields with financial limits and the ability to total the financial inputs.

Nifty "cut" button that allow user to "cut" the essential contact information from an applicants electronic file, for pasting into another document such as Microsoft Word.

Ability to generate address labels (such as 5160's) from the applicants contact information.

Compatibility with users/applicants who are using Macintosh computers and various browsers.

The application needs to appear as one document.

H:\Online Grant Project\Business Development Needs for IAC E.doc

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Current as of 10:14 AM, 6/8/2005

Tracking feature: applicants ought to be able to log on and view the status of their application

Artist needs the ability to access and print their application once they have submitted it. They also should be able to update their own contact information.

Tracking of appeals process:

If someone appeals for a grant they were not awarded, they are invited to come in and listen to the recording of the panel where the decision was made. It might be possible to digitize the tape recording into an audio file and make it available on your web site. Then the denied -grantee will not need to make an appointment to come into the office, instead he or she, can download the audio file directly onto their computer and listen to it in the comfort of their home.

Attaching artistic documentation as verification of fulfillment of the final grant report's obligations,

NOT requiring the Social Security # for each application UNTIL they are approved for funding reduces the liability exposure to IAC for 200 SS# to only those who are approved.

Applications that are not correct should NOT be accepted. For example if the dates or amounts are wrong.

Specify text boxes which must contain specific information or be filled in correctly in order to submit (mentioned above).

Pop-up text boxes that alert applicant to incomplete or erroneous info. (Standard stuff with on-line purchasing) POP UP: Your application cannot be submitted because the following information is missing (or incorrect), etc.

Applicant log-on feature (for tracking, etc.)

Applicant tracking feature (log on and find out where your application is in the process, where your check is, etc.) this will cut down on phone calls, maybe.

Document staging area where applicants or grantees can download various reports or documents. Reports such as the scores given out by the panels. Documents such as the W-9 form, the direct deposit form, the contract.

Len's notes from the Ohio meeting:

Access database. Partners will need to know how to use.

Notepad - text only. No right border in notepad. they said that they use notepad.

Back browser button. Text still saved if push back browser button (i.e. if made a mistake, and need to go back one screen)? Preferably make it so the text is still saved.

'Submit application' box pop-up confuses people into not submitting the application.

Character limitations. Should be able to tell how many characters left in field (how many more characters you can type in before you run out of space).

When bringing up applicants. Brings up all applicants, or just current year?
should be easy to merge to make labels/letters.

"status of grant" should have another choice for a grantee who was funded, but ended up not receiving the money (i.e. did not clear with dept. of revenue).

In search - no year option to search by (i.e. Only 2004 applicants).

Additional Notes from June 1, 2005 Online Grant Team Meeting:

- Draft feature with auto email reminder asking if they intend to finish
- Opt out fields
- Summary pages – linked to other financials
- Ability to build on previous year info/data
- Calculate money saved/added
- Must be arts language literate
- National Standard codes for NEA/default codes?
- Document staging area so applicants can revisit their last year's application and copy and update it.
- Character count/limit
- Legislative districts (All 3 are on AccessIndiana under "use your legislator")
- USPS auto corrections feature
- Check box to verify accuracy
- Should be able to upload databases created by matching fields